SALTWATER ANGLING IN BC — AN ECONOMIC PROFILE

Prepared for:

Economic Development Branch
BC Ministry of Sustainable Resource Management

With the Generous Support of:

Skeena Region (MSRM)

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BUILDING BLOCKS FOR ECONOMIC DEVELOPMENT & ANALYSIS

PREFACE

PURPOSE

Building Blocks have been conceived and developed by the Economic Development Branch of the Ministry of Sustainable Resource Management, under the guidance of Nancy South, Manager Economic Analysis, as an analytical tool that supports British Columbia coastal and land and resource use planning and decision-making and economic development initiatives. The Blocks contain concise business and sector information for a broad range of resource-based business types in BC. At this point, there are more than 30 Blocks either complete or in draft form. Several more Blocks have been identified as high priority by planning tables and other client groups. Additional Building Blocks will be developed over time, and some Blocks may be updated. For the most current Building Blocks, please see the Ministry of Sustainable Resource Management website, at: http://srmwww.gov.bc.ca/rmd/ecdev/

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BENEFITS

Building Blocks are expected to provide the following general benefits:

- Increase efficiency and more informed decision-making by providing readily accessible, credible information to planning and economic development processes;
- Improve the consistency of economic information across planning areas;
- Support economic analysis and decision-making that occurs outside formal coastal and land use planning processes; and
- Provide linkages between economic analysis and other social and environmental analytical tools (through identifying resource requirements to support economic activities and general compatibilities with other sectors and values).

LIMITATIONS

Every effort has been made to ensure that the information contained in Building Blocks is accurate and consistent. Approved, credible data sources are the foundation for Building Blocks. All Blocks were reviewed by sponsoring agencies and other experts. However, users are cautioned that information is used at their own risk, and that the authors and sponsors are not liable for any damages. Any conclusions or interpretations by the authors are not intended to represent government policy. Also, note that Building Blocks do not provide site specific information nor do they consider requirements for sustainability (social, community, environmental).

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RECOMMENDED REFERENCE/CITATION

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1.0 EXHIBIT 1: SALTWATER ANGLING IN BC 2002 — A PRELIMINARY SECTOR OVERVIEW

1.1 Overview

- 311,200 licensed saltwater anglers in BC in 2002.
- An estimated 2,100,000 angler days by licensed anglers in 2002 (1,650,000 angler-days by boat anglers and 450,000 angler days by shore, pier, and other non-boat anglers).
- Angling occurs throughout the year but 2/3 of activity takes place in the four summer months June through September.

1.2 Resources

- BC offers a diversity of sport fishing experiences over its extensive coastline.
- Anglers need access to healthy fish populations in a natural setting.
- Salmon (especially chinook), halibut, and rockfish are the main species of interest.
- Fish harvested in 2000 according to DFO mail survey of anglers – 0.48 million salmon (including 0.24 million chinook), 0.11 million halibut, 0.41 million rockfish, 0.10 million lingcod, 1.4 million shellfish (crabs, clams, oysters, shrimp/prawns, other).

1.3 Products

- Angling is a form of outdoor recreational activity.
- Angling occurs from shore, beach, pier or boat, and anglers use lures, bait, and flies.
- Three main components of the angling activity are:
  - Catching fish – regardless of whether the fish is harvested or kept,
  - Harvesting fish – for those anglers who are allowed to choose to do so,
  - Aesthetic experience – derived from the natural environment.
- In view of these distinct components, angling activity is measured not in units of fish caught or harvested, but in "angler days" defined as one angler fishing for any part of a single day.
- Three broad types of angling experiences exist:
  - lodges – typically offer all-inclusive packages comprising accommodation, meals, boat and fuel, fishing equipment, and sometimes a fishing guide who navigates and assists in catching fish. Lodge packages are often three to five days in duration,
  - charters – are angling packages that include boat, equipment, and guide, but no accommodation or meals. Charter packages generally last for one day or a half-day. There are however charter operations that in concert with accommodation facilities offer two to five day packages,
  - independent anglers – are responsible for their own fishing gear, boat and fuel, accommodation, meals, and transportation.
- In 2002 there were 2.1 million angler-days – 1.8 million independent angling days, 0.1 million charter angling days, and 0.2 million lodge angling days.

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1.4 Markets

- General angler profile (DFO, "2000 Tidal Angling Survey").
  - licensed angler residence: 64% BC, 13% Rest of Canada, 23% outside Canada,
  - average age is late 30s,
  - 80% male,
  - average of 10 years fishing experience in BC.
- On average, anglers from outside BC have higher household income than anglers from BC.

1.5 Regulatory Regime

- Canada Department of Fisheries and Oceans (DFO) has responsibility for licensing and regulation of saltwater angling in BC.
- All anglers must be licensed, pay fees, and observe catch limits (daily, possession, and in some cases annual), seasons, fishing area and gear, and other restrictions.
- Anglers 16 years and older pay licence fees (including GST) of:

	Residents of Canada	Non-Residents
Annual	$22.47	108.07
1 day	5.62	7.49
3 day	11.77	20.33
5 day	17.12	34.17

- A Salmon Conservation Stamp ($6.42 including GST) must be affixed to licences held by anglers wishing to retain salmon.
- Only barbless hooks can be used when fishing for salmon.
- Chinook limits are 2 daily, 4 possession, and an annual possession limit varying from 15 to 30 depending on the area. The combined catch limit of all salmon is 4 daily, 8 possession. Coho restrictions apply to many areas, e.g., retention only of hatchery fin-clipped coho.
- Halibut limits coastwide are 2 daily, 3 possession.
- There are special rockfish protection areas and limits.
- In 1999, DFO gave the recreational sector priority access over the commercial sector to chinook and coho salmon and gave the commercial sector priority.
- Access to sockeye, pink, and chum salmon.
- The Province does not license saltwater fishing lodges or charters/guides.

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1.6 Capacity for Growth

- There was a decline in activity and expenditures in the late 1990s followed by a slight rebound since 1999.
- The major reason behind the decline were the late announcement of fishing regulations, reduced bag limits in some areas, and area closures (all tied to conservation concerns for chinook and coho salmon).
- Other potential reasons behind the decline include:
  - Competition from other activities such as golfing, ecotourism, and nature observation
  - Increased costs
  - Demographics including increasing population age and urbanisation
- Potential growth areas include: shore fishing fly fishing experiences, experiences catering to women and family groups, high alpine fishing, experiences combining fishing and non-fishing activities (e.g. nature observation, adventure travel, golfing).
- Shore fishing growth tied to public infrastructure development, e.g., public boat ramps, enhancement-based fisheries.

1.7 Provincial Government Revenues

- Licence fees accrue to the federal government so there are no direct provincial revenues.

1.8 Input Output Impacts

- Estimated direct impacts of saltwater angling activity in 2002 were:
  - $550 million in angler expenditures,
  - $120 million in wages and benefits paid,
  - 3,590 person-years (PYs) of employment generated.
- Indirect (supplier-related) and induced (consumer re-spending) impacts add 50% to 100% to the direct impacts above.

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2.0 EXHIBIT 2: SALTWATER ANGLING IN BC 2000 – A PRELIMINARY ECONOMIC PROFILE

	Total Activity 2000	2000 Activity Ratios per	
		Active Angler	Angler-Day
Active Anglers			
BC Residents	145,500	0.60	0.07
Residence of Rest of Canada	36,200	0.15	0.02
Non-Canadians	61,500	0.25	0.03
Total	243,200	1.00	0.12
Salmon Conservation Stamps	205,300	0.84	0.10
Angler-Days			
From boat	1,620,000	6.7	0.81
From shore, pier, etc.	380,000	1.5	0.19
	2,000,000	8.2	1.00
Angler Expenditures[1]			
Major Expenses			
Boating Equipment	$102.0 million	$419	$51
Fishing Equipment	18.0 million	74	9
Other	97.9 million	403	49
Direct Expenditures			
Packages	78.5 million	323	39
Accommodation & food	60.6 million	249	30
Travel	42.4 million	174	21
Owned Boat Costs	50.8 million	209	25
Suppliers & Services	29.2 million	121	15
Licence/Access fees[1]	7.4 million	30	4
	$486.8 million	$2002	243
Provincial Government Revenues[2]	$0	$0	$0

Source: GSGislason & Associates Ltd. estimates based on DFO "Survey of Recreational Fishing in Canada" and DFO licence data.

[1] Includes GST
[2] All licence fee revenues accrue to the federal government

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3.0 EXHIBIT 3: BC TIDAL WATERS SPORT FISHING LICENCE SALES AND REVENUES

	Fiscal Years				
	1986/87	1990/91	1994/95	1998/99	2002/03
License Type					
Resident*					
Annual	269,498	218,253	206,387	110,713	116,818
5 Day	0	0	0	8,769	9,052
3 Day	0	0	0	15,115	16,763
1 Day	18,014	42,808	40,625	37,673	34,082
Senior	0	26,974	24,081	16,798	19,201
Juvenile	0	52,729	53,432	45,925	45,184
Subtotal	287,512	340,764	324,525	234,993	241,100
Non-Resident					
Annual	20,210	14,257	15,040	5,230	5,107
5 Day	3,569	12,247	16,326	21,768	19,319
4 Day	4,333	9,292	12,170	0	0
3 Day	9,373	14,162	13,667	22,978	17,953
2 Day	8,390	14,111	13,687	0	0
1 Day	19,673	23,320	22,504	28,290	22,021
Juvenile	0	6,021	7,462	6,438	5,707
Subtotal	65,548	93,410	100,856	84,704	70,107
Total	353,060	434,174	425,381	319,697	311,207
Licence Revenue**	$2,164,000	$4,453,000	$4,611,000	$6,189,000	$6,191,000

Source: DFO

* Resident of Canada

** Includes tags/stamps

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4.0 EXHIBIT 4: CATCH OF FISH SPECIES BY BC SALTWATER ANGLERS 2000

		Angler Catch		
		Harvested	Released	Total
Finfish				
Salmon	- Chinook	239,800	343,600	583,400
	- Coho	86,000	383,500	469,500
	- Pink	95,700	136,600	232,300
	- Sockeye	55,000	30,100	85,100
	- Chum	8,200	33,000	41,200
Halibut		111,400	38,200	149,600
Lingcod		101,500	174,300	275,800
Rockfish		405,700	471,000	876,700
Other Finfish		170,000	177,600	347,600
	Total	**1,273,300**	**1,787,900**	**3,061,200**
Shellfish				
Crab		727,500	n/a	727,500
Clams		184,200	n/a	184,200
Oysters		146,200	n/a	146,200
Shrimp/Prawns		317,900	n/a	317,900
Other Shellfish		23,000	n/a	23,000
	Total	**1,398,800**	**n/a**	**1,398,800**

Note: DFO Pacific Region does not necessarily agree with these estimates

Source: DFO "2000 Survey of Recreational Fishery in Canada"

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